Service Professional Onboarding Pricebook

Mr. Handyman of South Charlotte

Agenda

- Finding the Task in the Pricebook
- Material, Price & Equipment
- Review Present, Estimate and Invoice
- Commercial Estimate
- Authorization

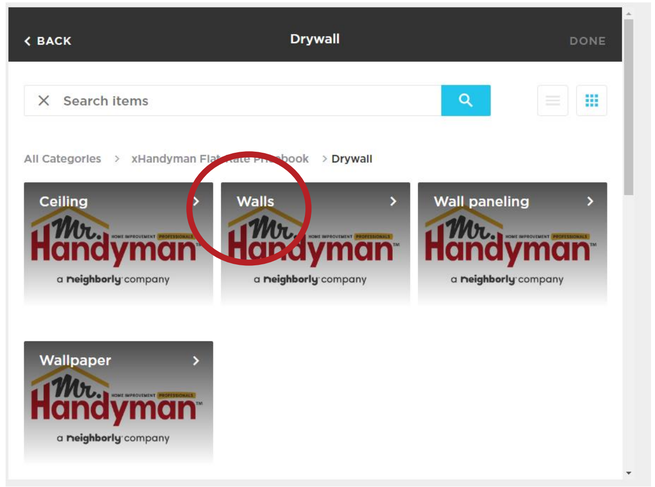
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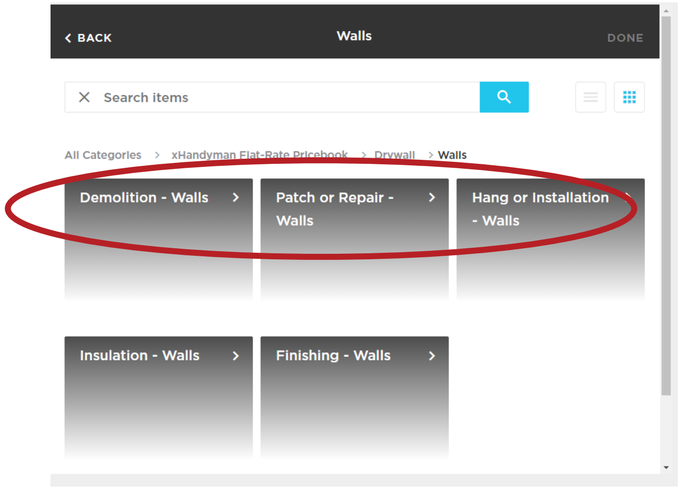
Finding the Task in the Pricebook

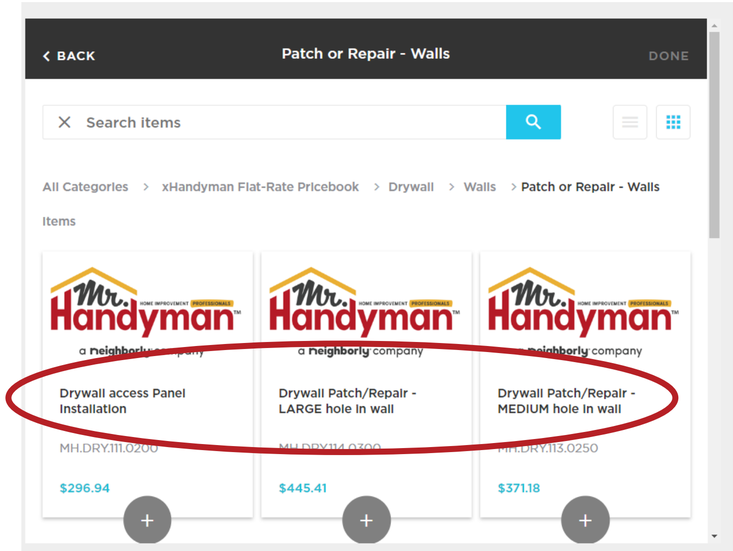
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Finding the Task

- Categories have specific items – many in multiple areas of the Pricebook.
- Use the search feature to find the task quickly
- Simply type a keyword into the search bar – keep this to one or two words
- Example, i.e., Drywall Repair, Door Replacement, Toilet Replacement
- You must have a task for the estimate that describes what the work will be that you are performing.
- Add the task to the estimate.
- In the below example, drywall was chosen in the search box, then walls and then the size of the drywall repair.
- You can also use the voice feature to speak into the search.







Pricebook Categories/Tasks

The key to leveraging the Pricebook for accurate estimates, is understanding where to locate a tasks and disclaimers. It is important for you to familiarize yourself with the categories and tasks in the Pricebook.

- Material Acquisition
- Jobsite Preparation
- Carpentry- Finish/Trim
- Diagnosis Levels



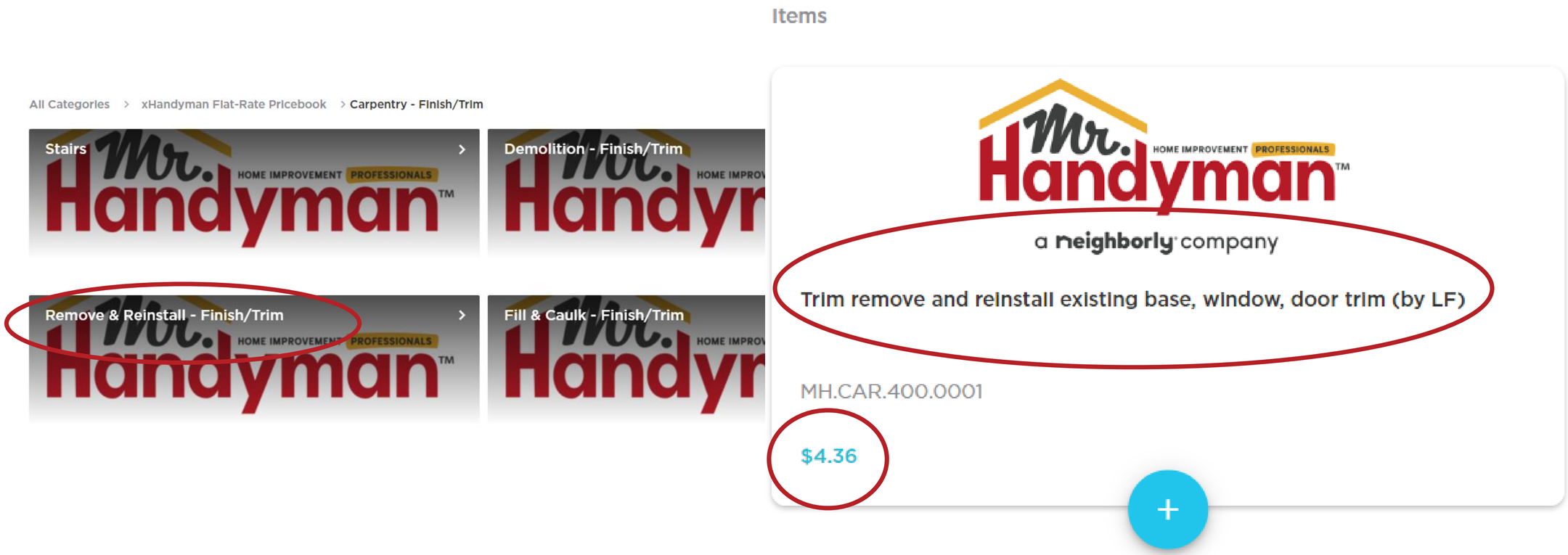
Pricebook Tasks

Let’s look for the following tasks in the price book…

- Paint or stain deck rails
- Window repair
- Paint exterior window
- Fascia repair
- Installed Tile
- Shed repair
- Drywall repair
- Interior Door Installation
- Deck Repair
- Vanity cabinet installation
- Kitchen faucet installation
- Light fixture installation

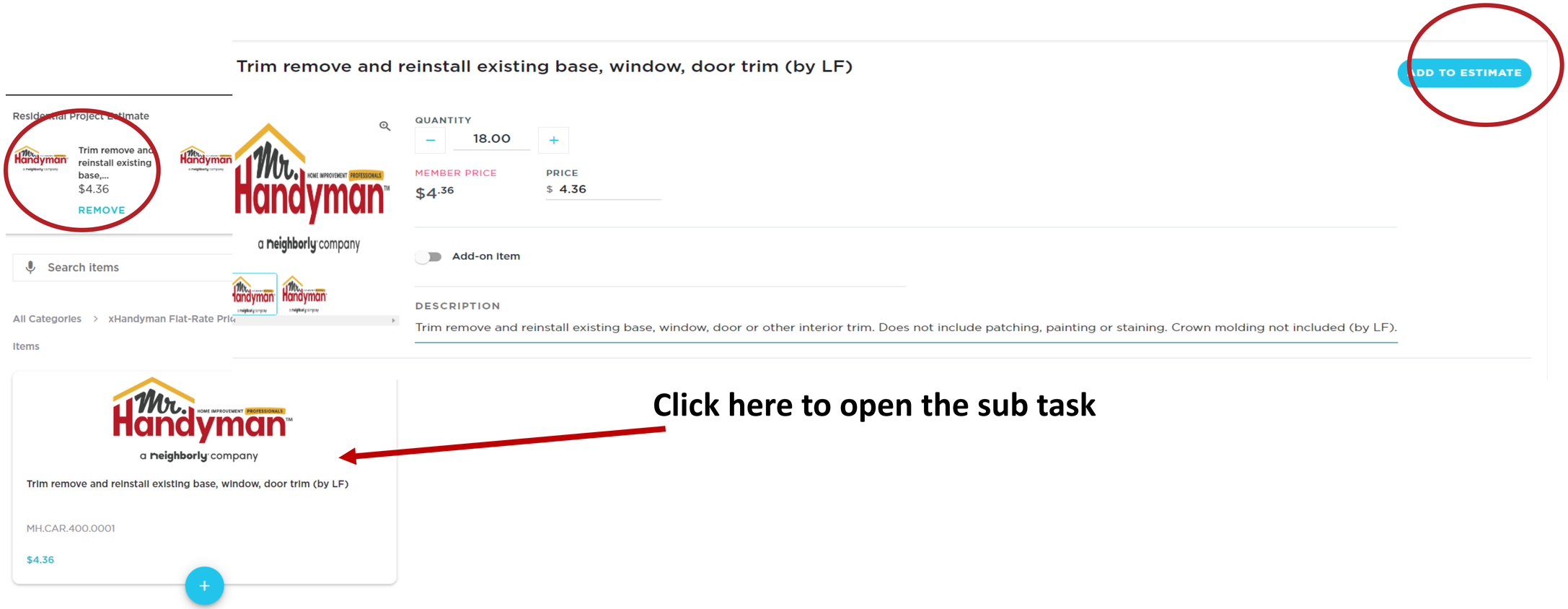
Carpentry – Finish/Trim

- In the Carpentry task, there are multiple options to choose
- Example, under finish/trim you will find stairs, demolition finish trim, remove & reinstall finish trim.
- Choose Remove and Reinstall – Finish Trim



Carpentry – Finish/Trim

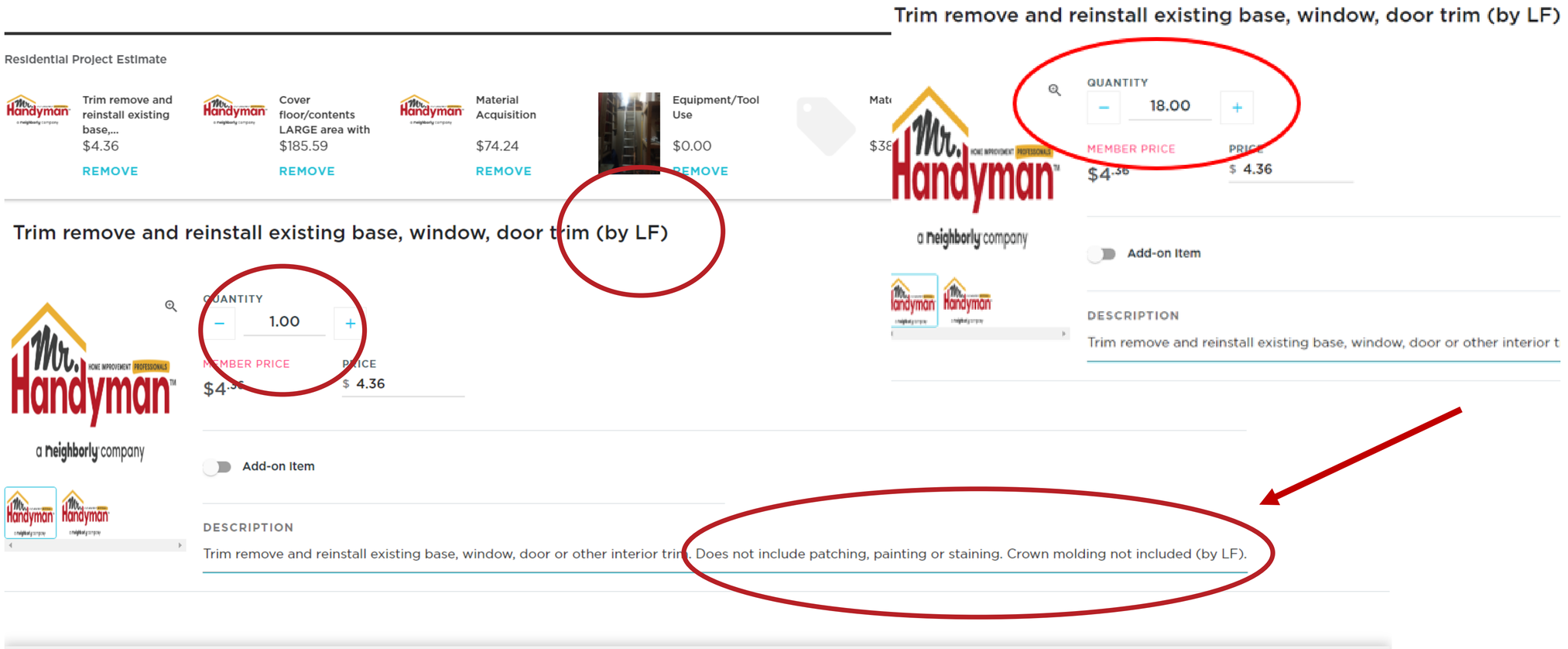
- To add a subtask to the estimate, just click on the box with the task.
- And then click on add to estimate.



Click here to open the sub task

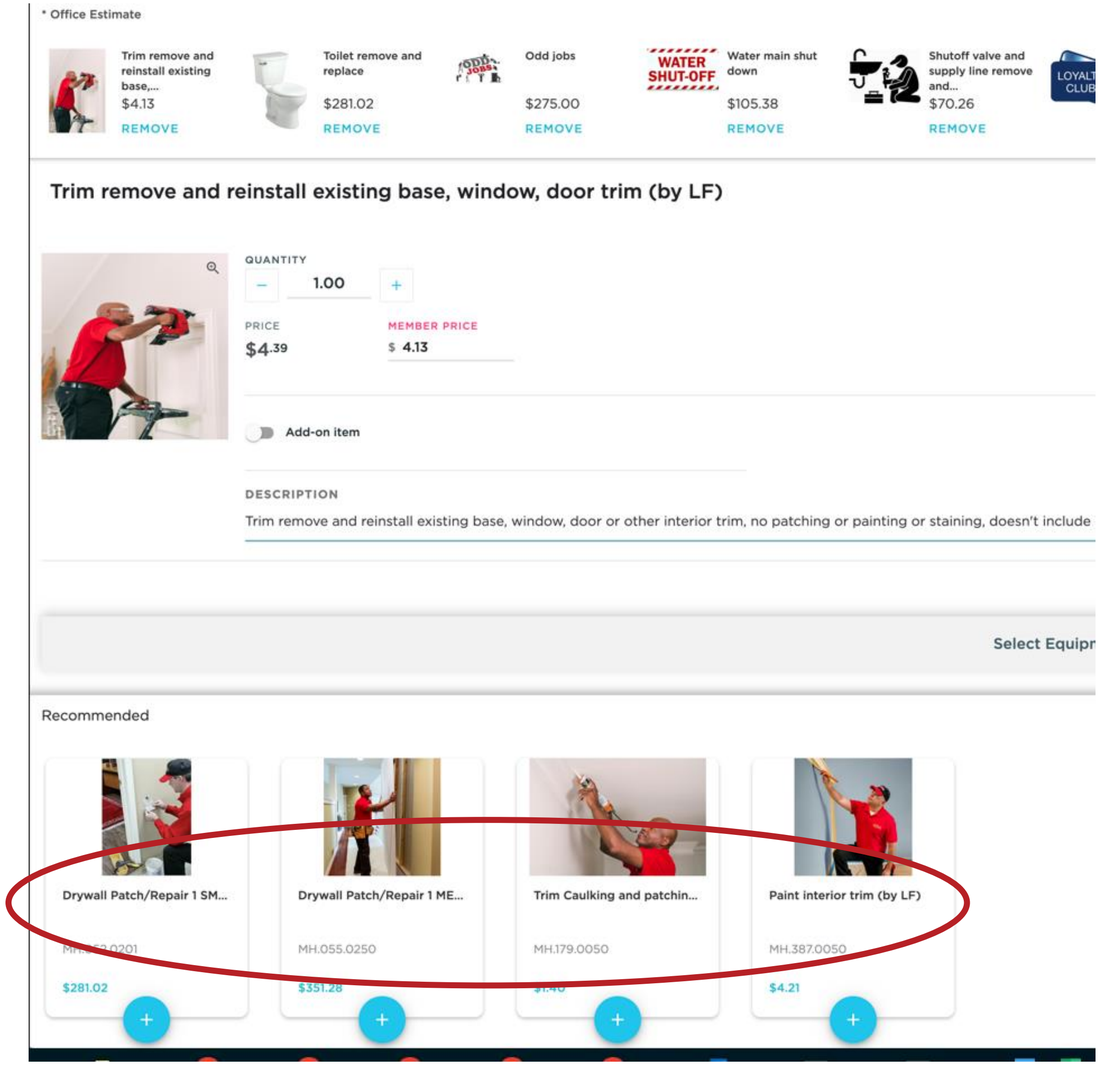
Carpentry – Finish/Trim

- The Carpentry – Finish/Trim category is measured in Linear Feet
- When updating the quantity for the estimate, ensure you follow the measurement listed in the title of the task.
- Also carefully read the description to ensure you did not miss another task that potentially needs to be added.
- Ensure you have added any job specific information, i.e., location of work, size of work, and ensure to remove any “by estimate” language from the description.



Carpentry – Finish/Trim Recommendations

- Once your task as been added to the estimate, recommendations will appear for that specific task.
- Review all the recommendations for the task and choose all that apply for the job.
- Simply click on add to estimate.
- Example, i.e., Carpentry – Finish/Trim
  - Will you need drywall repair?
  - Caulking?
- Each recommendation has a price
- When added to the estimate the price can be adjusted



Diagnostic Jobs

- Diagnostic Jobs are typically projects that need some level of investigation prior to developing an estimate, i.e., Leak, Electrical, and Window Part Replacement.
- Office will attempt to get photos from the customer.
- Diagnosis Level Selection
  - When selecting the appropriate diagnosis level should be based on time spent investigating the leak, electrical issues, etc.

	Diagnosis Level 1		MH.DIA.001.0100		... › Diagnosis Levels.	Diagnosis 1. Investigation to determine resolution of the...	1	$145.00
	Diagnosis Level 2		MH.DIA.002.0200		... › Diagnosis Levels.	Diagnosis 2. Investigation to determine resolution of the...	2	$290.00
	Diagnosis Level 3		MH.DIA.003.0300		... › Diagnosis Levels.	Diagnosis 3. Investigation to determine resolution of the...	3	$435.00

Diagnostic Jobs

Task #	Description
MH.MRE.605.0100	Replace 20 spiral balances, pivot shoes and shoe brackets in windows. Replace lock on basement patio door. All materials were ordered and paid for during 6/23/23 visit.
MH.1954.011.0000	Daily travel and destination charge
MH.DIS.100.0001	Disposal fee
MH.1954.009.0000	Fuel surcharge.
MHCC10001	Credit Card Processing Fee
MH.1954.012.0000	Payment is due at the end of each day for services performed that day unless other arrangements have been made. We accept checks, cash and credit card payments. Thank You.
Material Charge	Supplies purchased for job.
.	***We appreciate your business!*** Estimate of work is based on what can be reasonably viewed from consultation. Mr Handyman is not responsible for any underlying structural/ mechanical issues that may be uncovered as we work through the project. Any additional work or change orders will be discussed with homeowner and review additional charges for approval.

- Estimate attached to the Job should be for the work to repair the leak. See Left
- Invoices for Diagnostic Jobs See Example Below
  - Invoice Task should include what was discovered in the diagnosis.
  - Example of Task Language:
    - Diagnosis 1. Investigated to determine the cause of the leak. Tech followed leak and determined the cause of the leak was coming from the Master Bathroom shut off valve leaking. Provided an estimate to replace the shut off valve, repair the drywall in the kitchen.

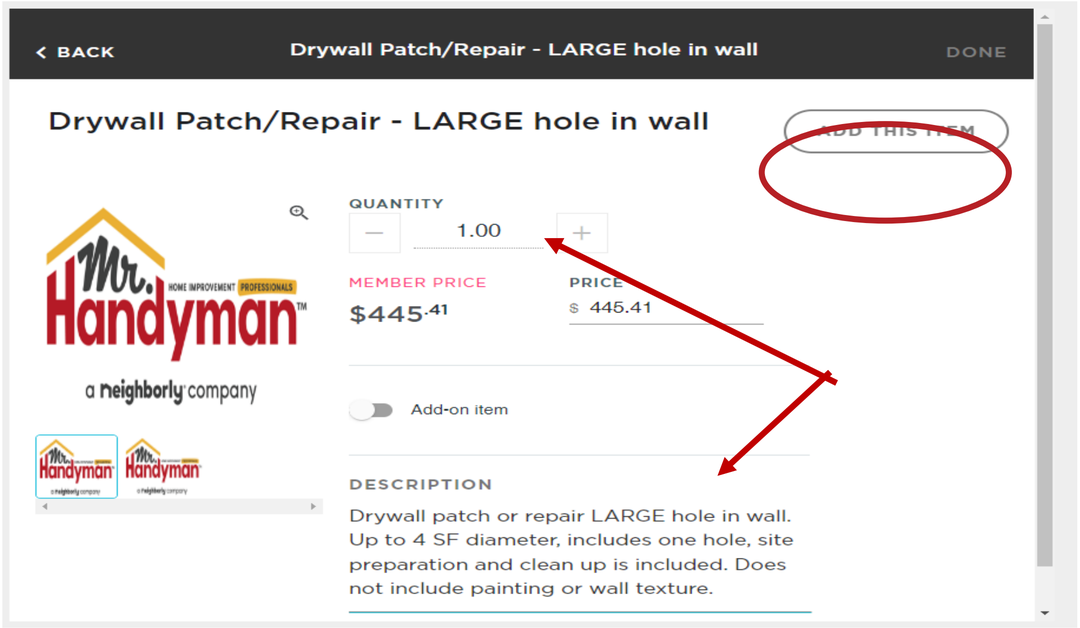
Task #	Description	Quantity	Your Price	Total
MH.DIA.001.0100	Diagnosis 1. Investigation to determine resolution of the problem. paid for materials that were ordered - will return to install parts once they have been delivered.	1.00	$144.43	$144.43
Material Charge	Supplies purchased for job.	1.00	$474.00	$474.00

Material, Price, Equipment

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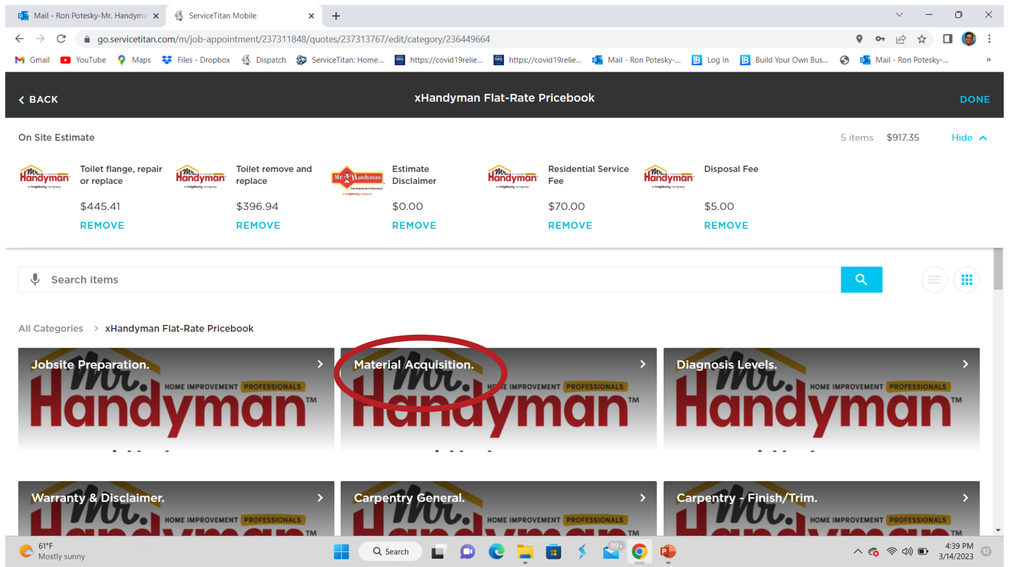
Adjusting the Price

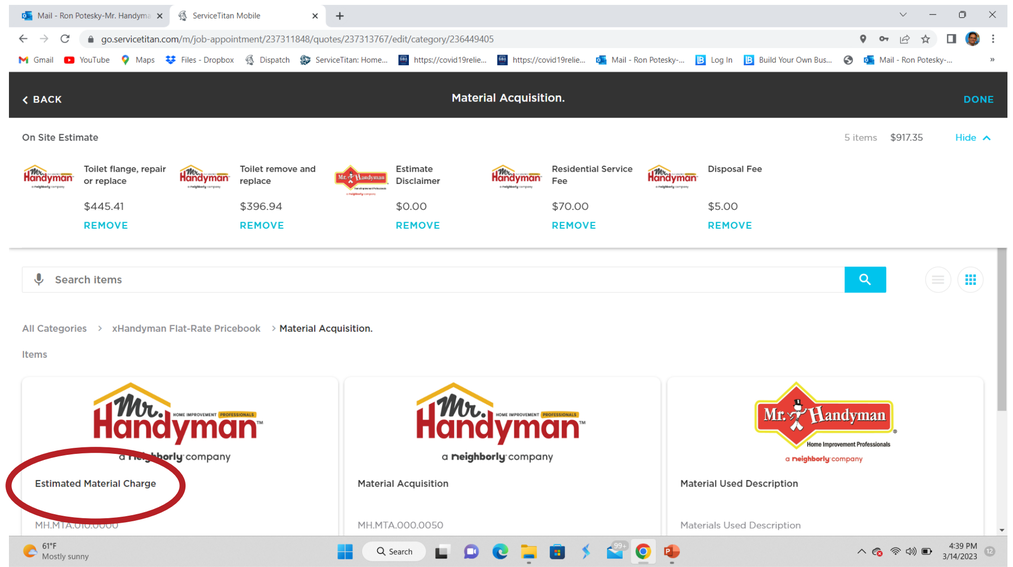
- The price book rates are based on our hourly rate and a national average time to perform the task.
- You can change the price on the task
- Once you have added the task, you can adjust the price.
- The price should only be adjusted if you believe the national average of time is too low or if multiple repairs will use that task.
- The description will be auto populated for each task you add to the invoice.
- Example, you are installing two light fixtures, change the number to two.
- Click on add to the estimate



Estimated Material Charge

- You can add materials easily in Material Acquisition category
- Then click on Estimated Material Charge

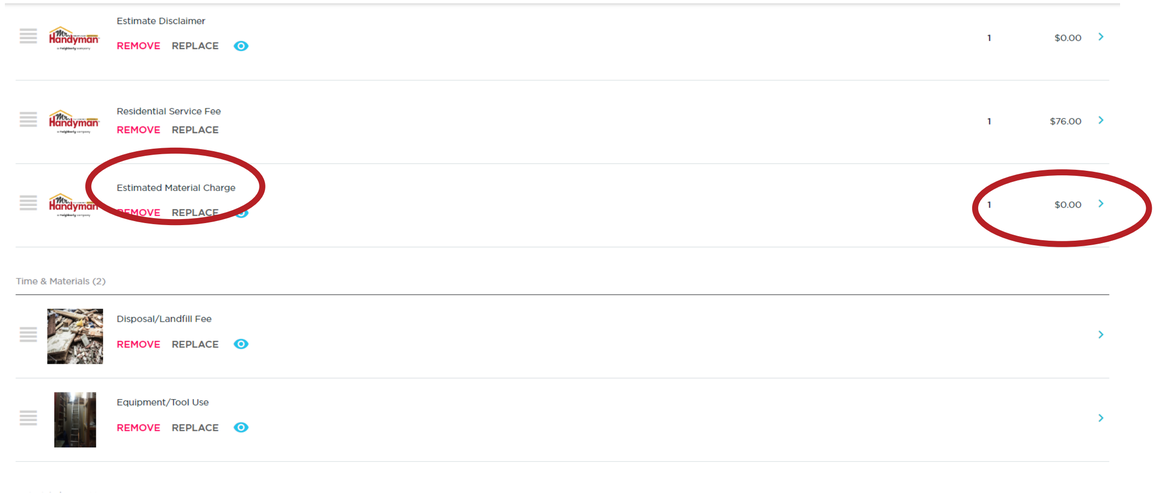


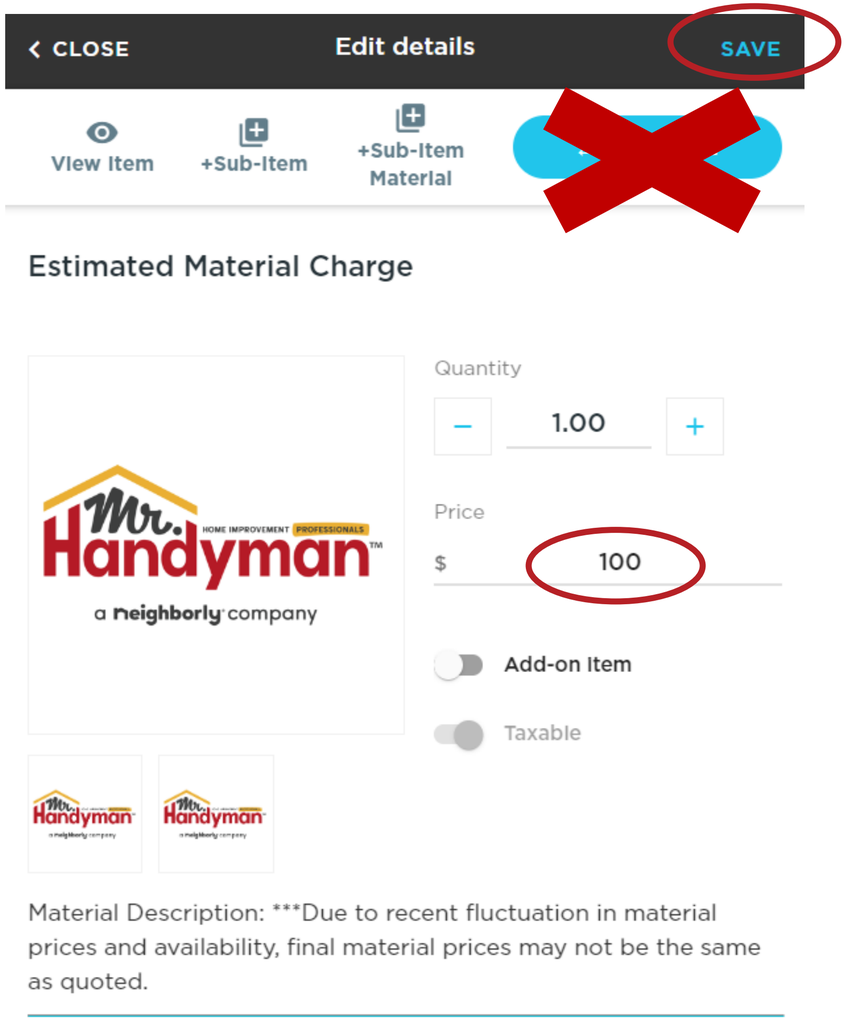


Estimated Material Charge

- This will allow you to estimate materials (get price online and double it for estimate)
- When saving estimated material charge click on save.
- Do not click on the replace button
- When you get the customer signature on the estimate. The estimate will convert to an invoice.
- You can then delete the estimated materials and put in actual purchase order and van stock.

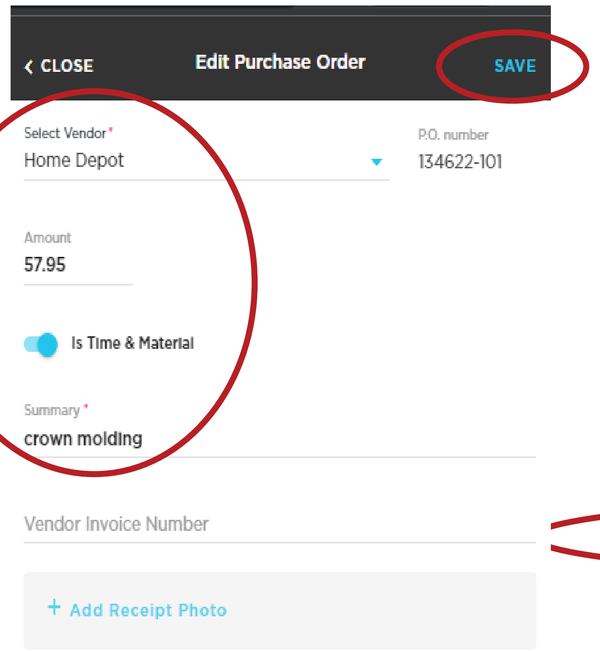
Review the final invoice prior to presenting to ensure the estimated materials is not remaining in the invoice.

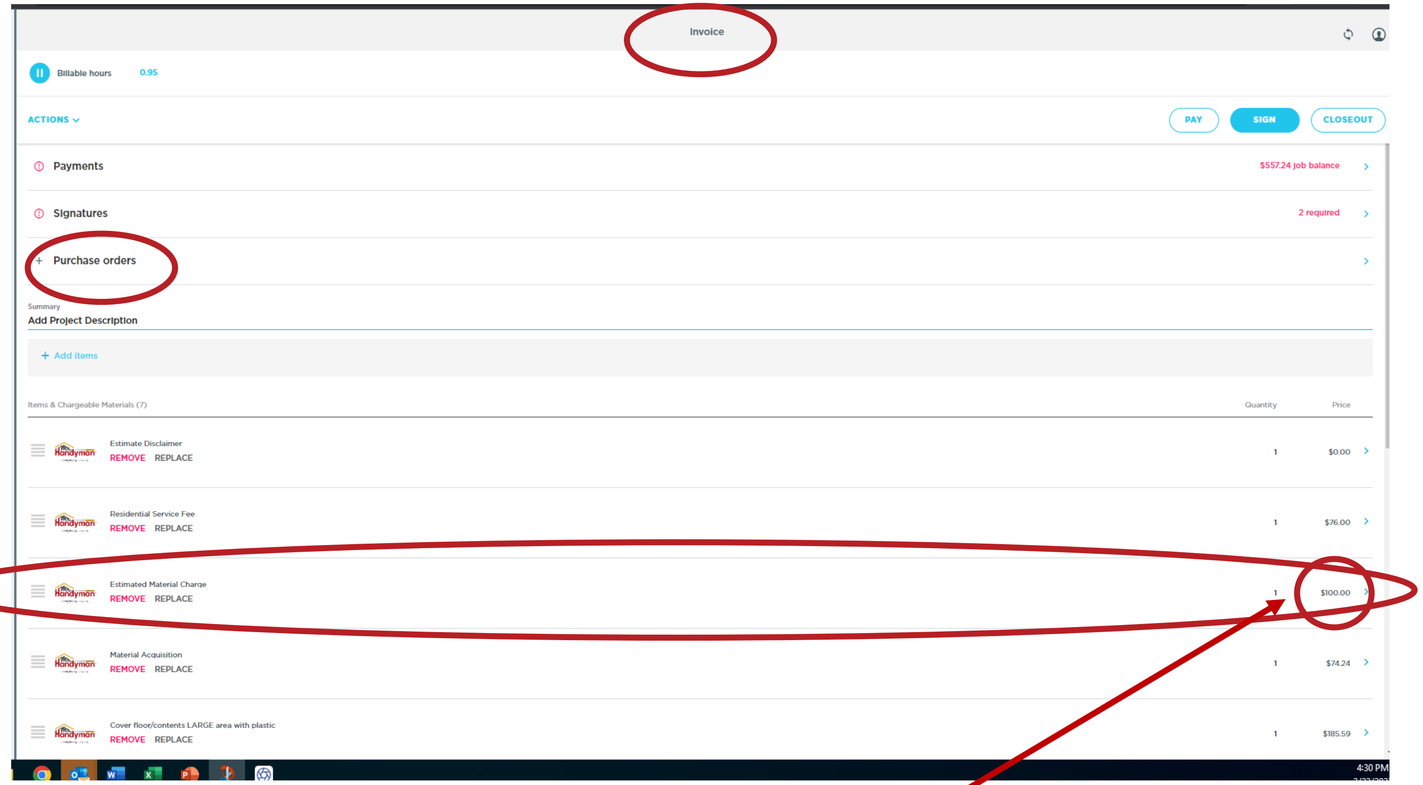




Adding a Purchase Order

- Any special-order materials require up front payment for the materials prior to the order.
- Ensure you are in the invoice
- Click on add Purchase order, edit as needed and save.
- Zero out the Estimated Materials after you add your purchase order.





Zero out after putting in purchase order – add material description so client can see

Equipment Charges



Aluminum Brake Rental Fee

MH.SCG.028.1000

$75.00



Aluminum Coil Fee

MH.1954.006.0000

$0.00



Extension Ladder

MH.1954.019.0000

$40.00



Generator

MH.1954.014.0000

$40.00



Panel Lift

MH.1954.015.0000

$40.00



Pressure Washer Fee

MH.SCG.026.1000

$75.00



Erect Scaffolding - 2 Levels

MH.JSP.401.0300

$433.29



Scaffolding Fee

MH.SCG.027.1000

$40.00

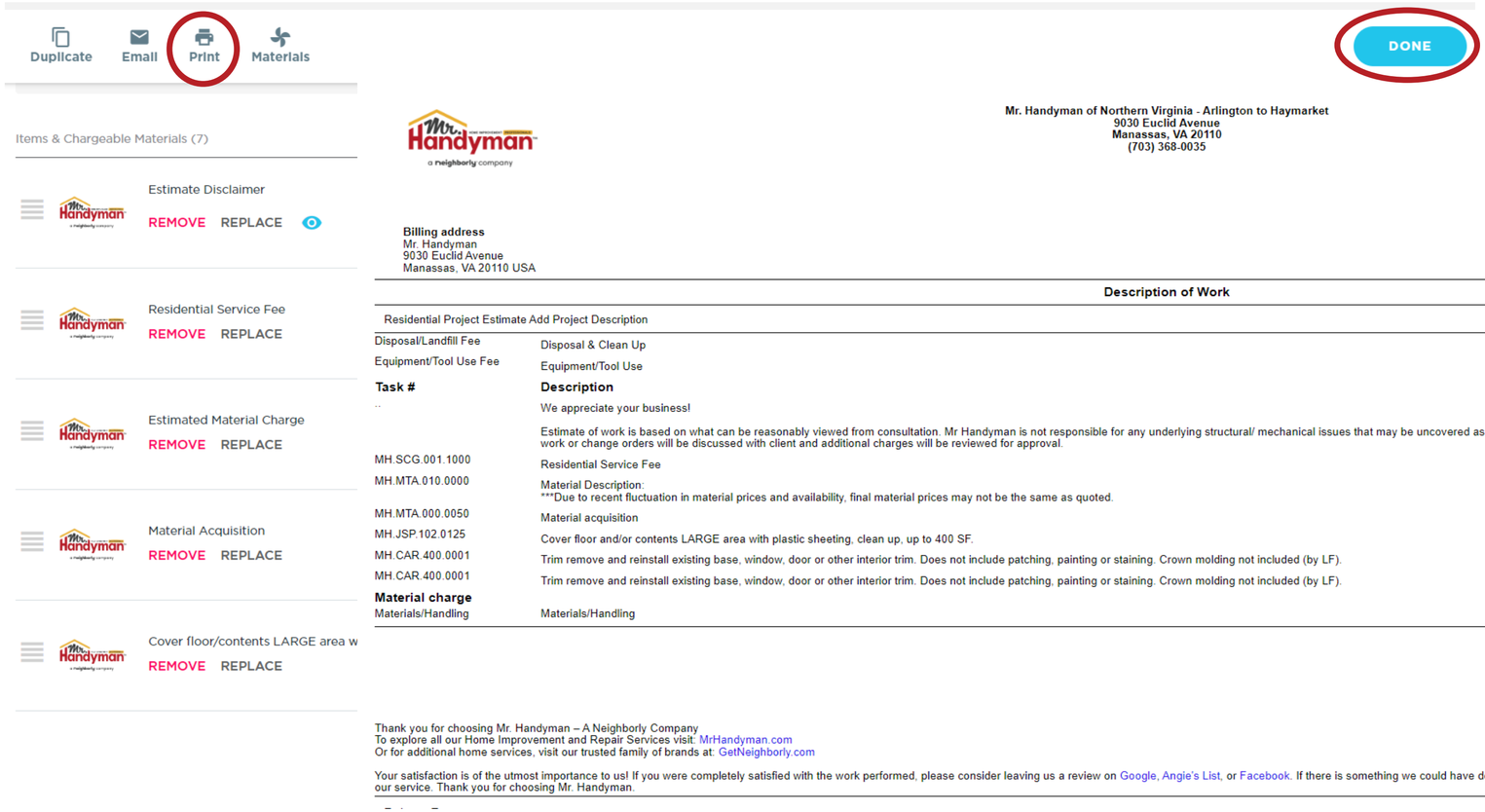
- Where can we find equipment in the Pricebook?
- When do we charge for the company owned equipment?
- How are tags used to trigger the charge?

Review & Present Estimate/Invoice

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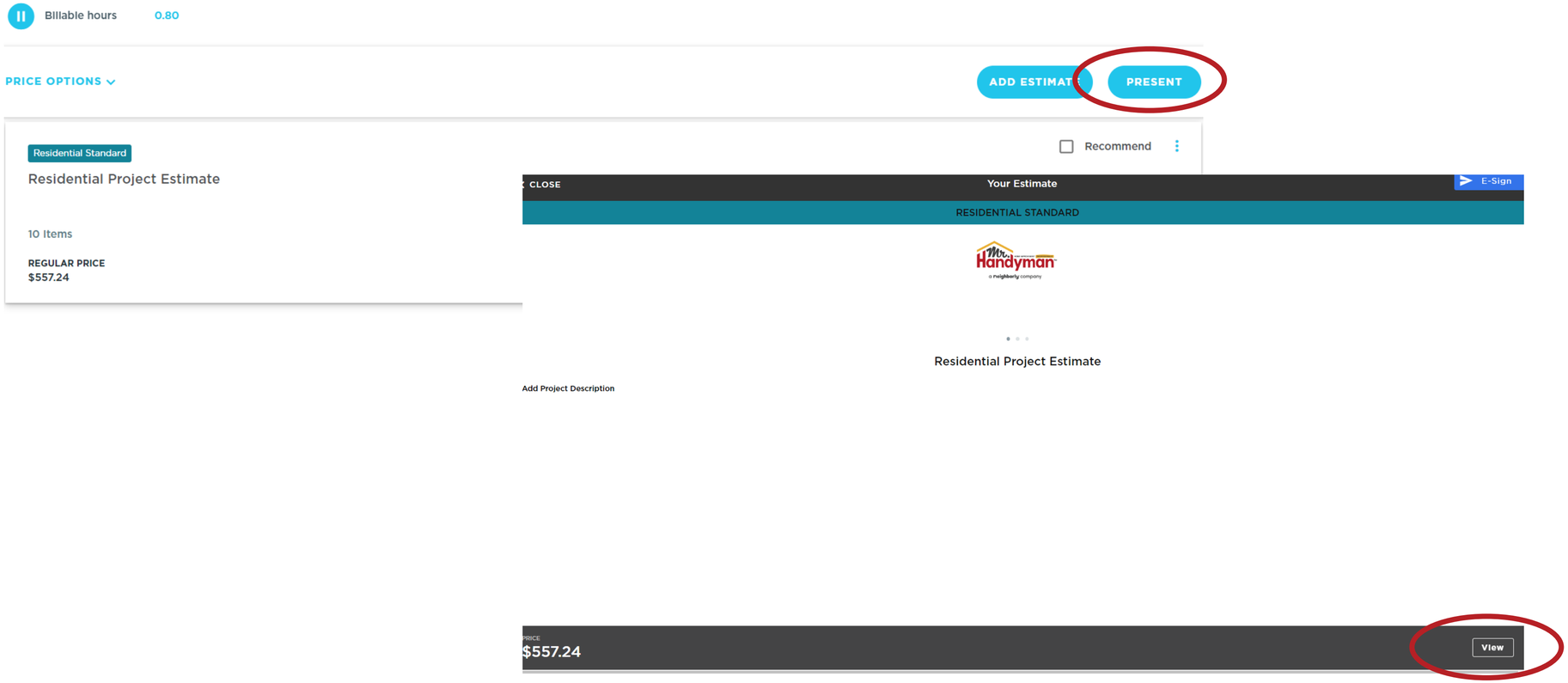
Review Estimate

- It is important your estimate is complete.
- Click on Print, view and edited if needed.
- Make any necessary edits.
- Click on Done



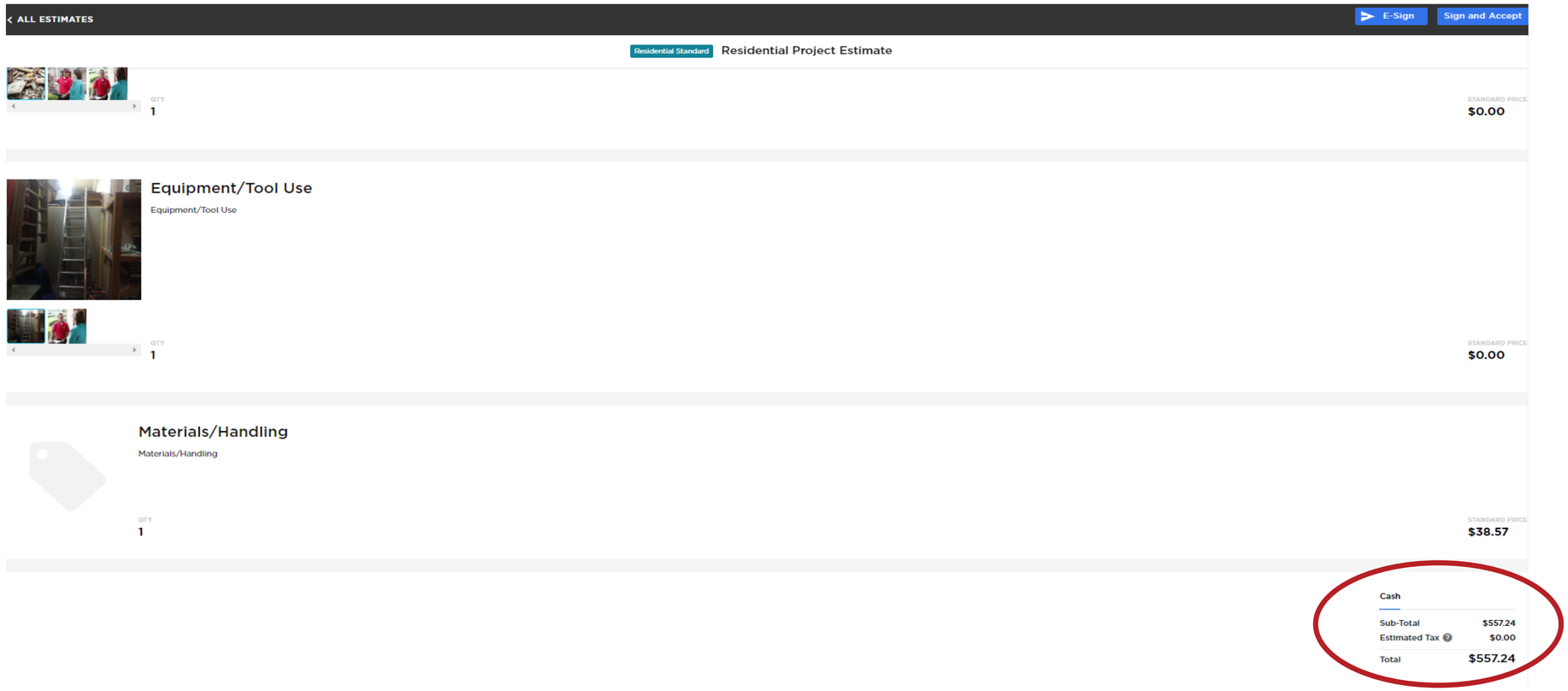
Presenting the Estimate

- You are now ready to present the estimate to the customer.
- Head back to the customer's home/business.
- ***Select Present and then View. Ensure you choose line-item pricing hidden before presenting estimate to customer.***



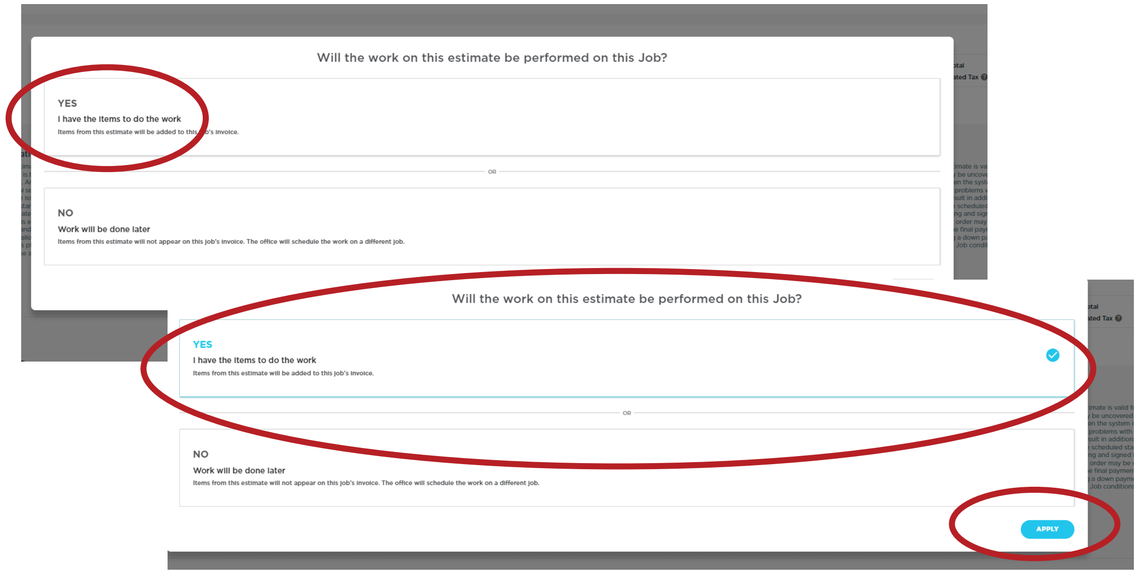
Presenting the Estimate

- After returning to the customer's home/business, let them know you are going to review the estimate with them, they can approve the estimate and you are ready to begin their project.
- Walk the customer through the estimate you prepared, including the price.



Estimate Approval

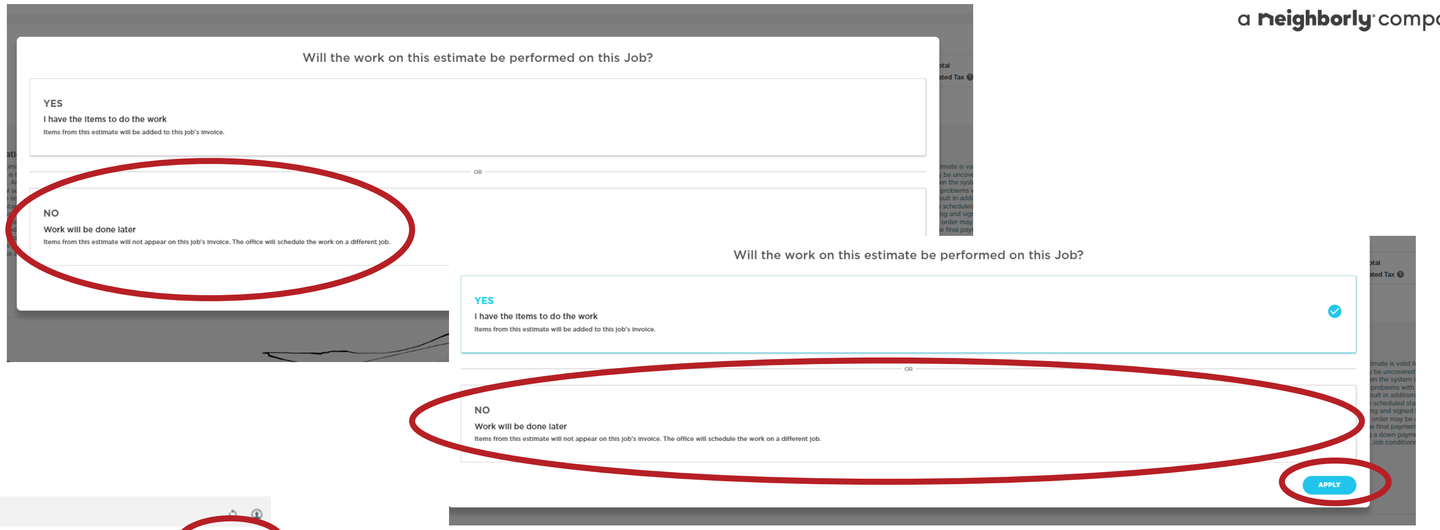
- If the customer is ready to move forward and start the work, click on Yes and then Accept.
- A screen will pop up that states Change Invoice
- Click Replace



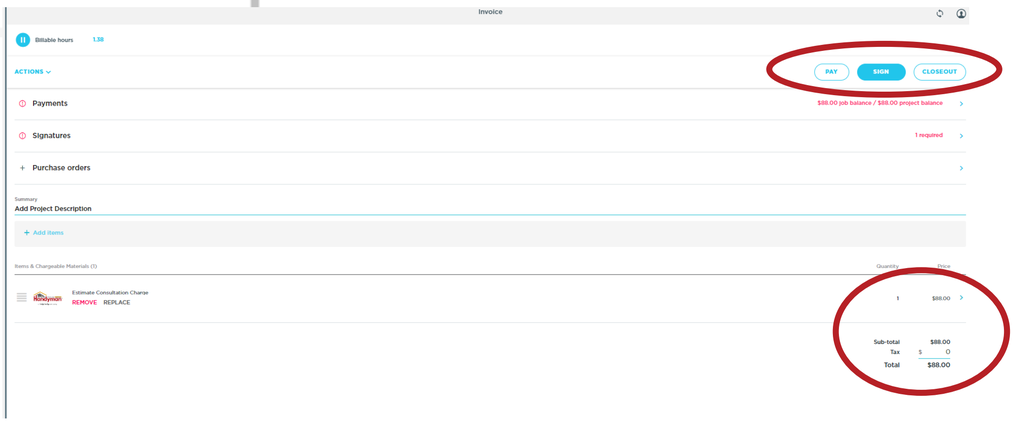


Estimate Declined

- If the customer does not want to move forward, click on No and then Accept.
- A screen will pop and Click Done.
- Customer will need to sign for a final time.
- If the work is not being done same day, ***do not sell the estimate***.

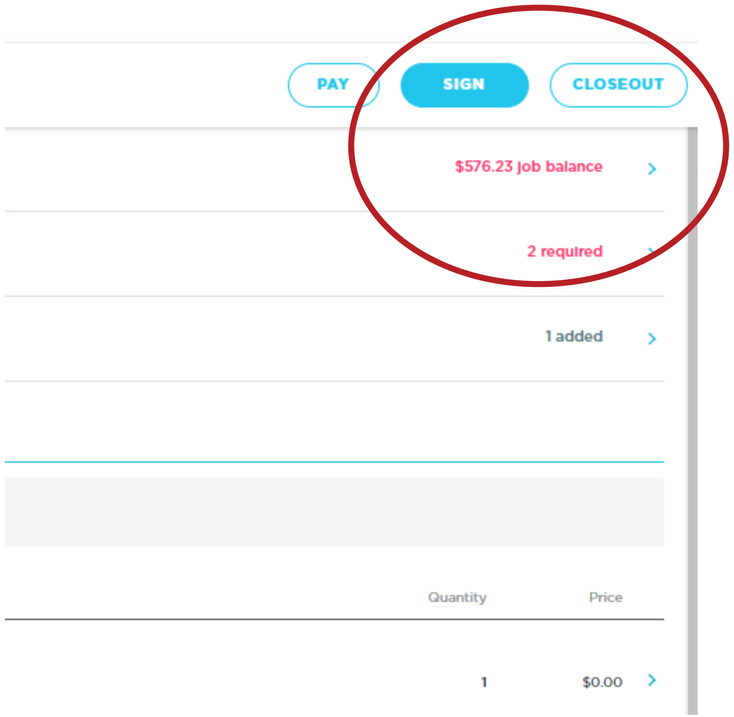


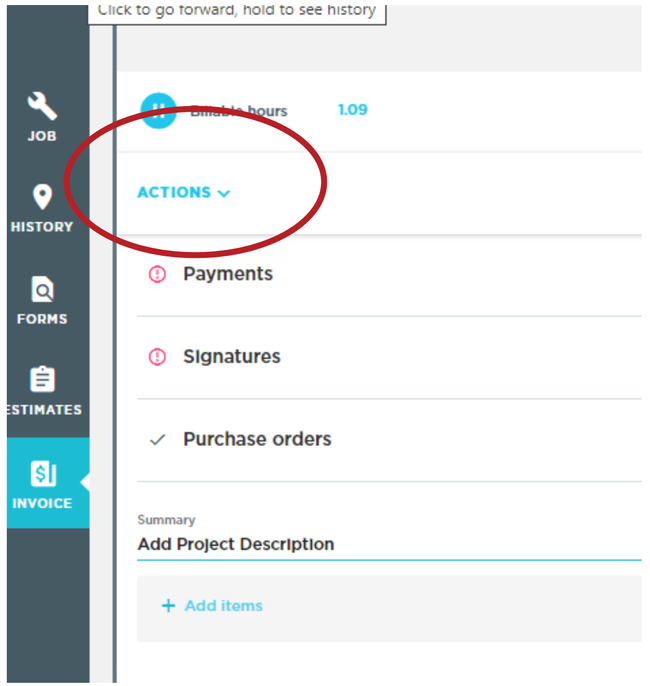


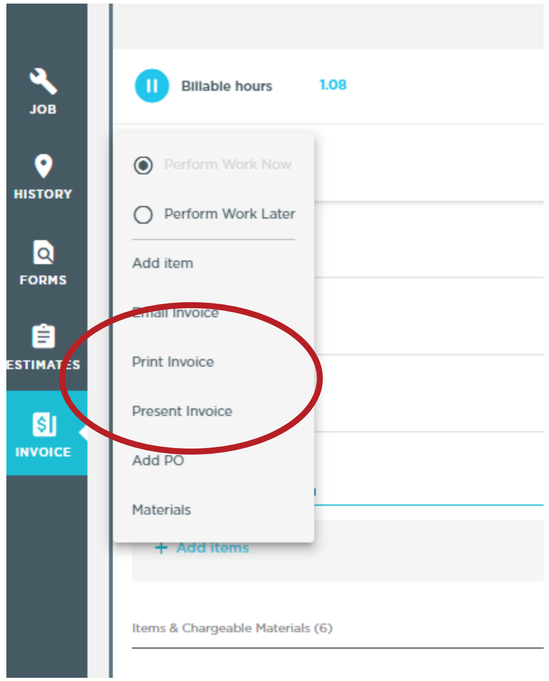


Invoice

- Double check the invoice to ensure it is accurate.
- Click invoice to double check accuracy.
- If correct, click actions and then present invoice or print invoice.







Commercial Estimate

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Commercial Estimates

National Service Providers

- Once you complete the estimate, call the office to secure approval.
- Signature box should say office (if the office is securing approval).

Local Commercial

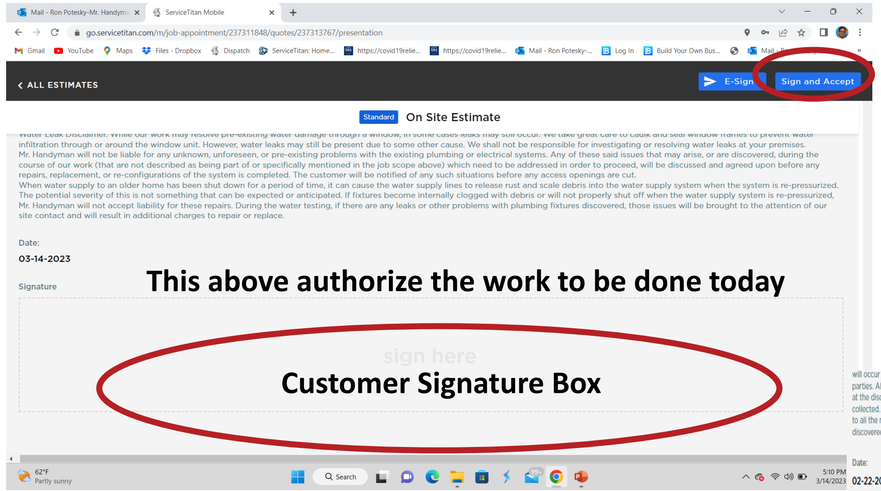
- Customers would indicate who is able to sign off on the estimate. If that person is not available to sign call the office for approval prior to starting the work.

Authorization

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Disclaimers & Authorizations

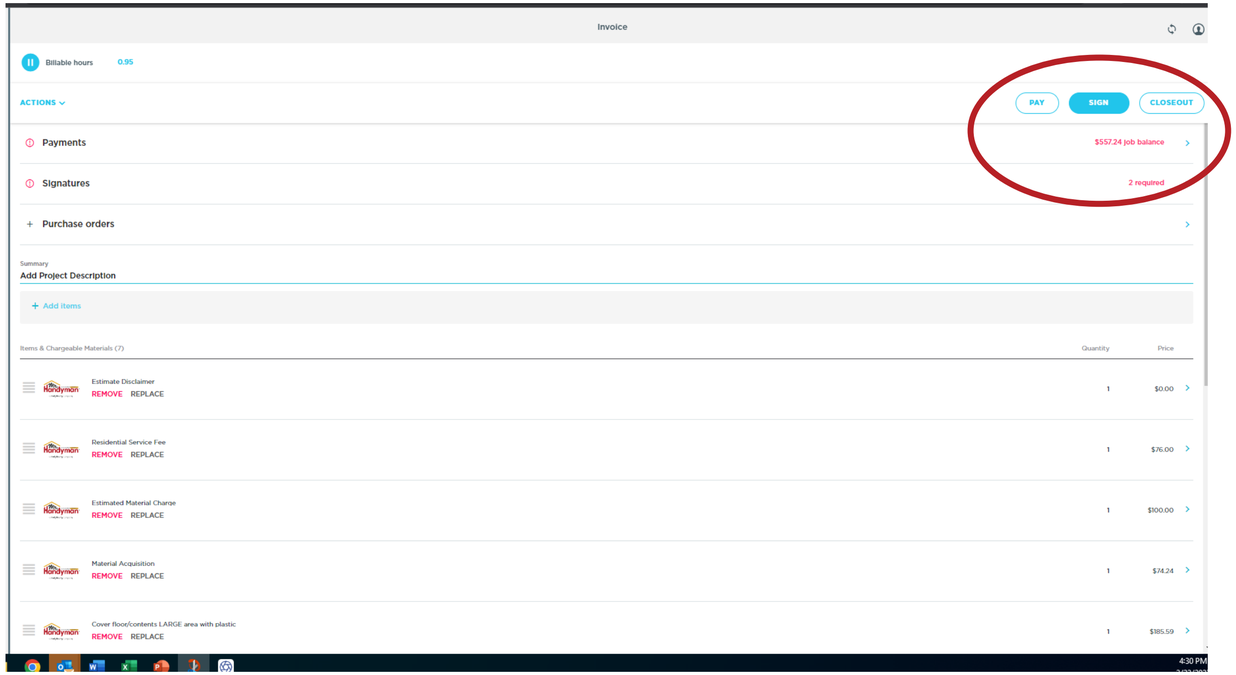
- Whether the customer is ready to proceed or not, a signature will need to be secured.
- Click on the sign and present button.
- The Disclaimer will pop up above the signature line.
- Customer will sign the iPad
- Click Sign and Accept





Customer’s Signature

- You are ready to get the customer’s signature to proceed.



Client Authorization

- When do you collect signatures from Customers?
- Why do you collect signatures from Customers?
- If a Customer is not available, what do you do?
- Who signs Estimates for Commercial Customers?
- Who signs Invoices for Commercial Customers?
- How do you get approval for estimates and change orders?

Questions

